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Personnel Welfare Committee 2004-2005

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Pre-Microfilm Inventory

Collection: Bowling Green State University
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Location: Bowling Green, Ohio

Title of Series: Personnel Welfare Committee

Inclusive Dates: 2004-2005

Format: ☐ Bound ☒ Loose

Order: ☐ Alpha ☒ Chronological ☐ Numerical

Index: ☐ Included ☐ Separate ☒ None

Notes

1. Colored Paper
2. Pencil
3. Colored Ink
4. Photocopies

M W Th
Wed

PWC 10/13/04

1

Salaries -

1st July July Aug.

HR website

not salary book

sort: gender then hire date
percentage of protection

* BOT - personnel change
to Dave

Vac loss problem →

letter to employee

you are going to lose
vacation as of

to supervisor

to supervisor's approval

reminder to
mid year eval.
look at vacation accrual
to be sure they are
using vacation at the
recommended rate

conducting evaluations is part of
meeting the minimum expectations

constituent group
sick leave pool
for catastrophic
NSF said ORC
presented outside
a union environment

10 request mid point
studies to be much
to bring people to
mid point

1012 For patterns broke 3-5 yrs for
who lost vacation hours

GOALS - 3/4 combine

5/6 combine Hi Priority

2/3 8/9 combine

Hi priority

no union
comp time vs flex time
hours worked

"Perpetual" preponderance of
time

1 & 2 continue to explore tied to PeopleSoft
push for 60 day pay out @ retirement
in personal compensation comm.
in March/Apr

expectations, needs of job

7 Hi Priority

8 Hi Priority

9 - does HR have this info

1. AST Handbook changes
see p 22 and 40

managing email from who will be
over 40 by July 20
M & J notice
constitution list
check pay stub

letters out?
7-50 non renewal 1772

PWC GOALS FOR 2004-05

- 1) Change vacation days paid to retirees from 40 to 60 days (same as Classified) which could be compensated in pay (lump sum)
- 2) Advanced notice of potential loss of vacation time to supervisor & employee
- 3) Recommended guidelines for comp/flex time for hours worked over 40
- 4) Review working environment for Administrative Staff. Clarify wording of statement in handbook. (variable work schedule and use of term 'perpetual')
- 5) Standardize how Mercer is used in the hiring process
- 6) Clarify role of Mercer As more involved while they study pay 12/1/00
- 7) Continue work toward midpoint without penalizing other employees. Continue review of Compensation overall including benefits package.
- 8) Request salary study by gender, # yrs service
- 9) Request turnover study by gender, # yrs service, salary
- 10) Request midpoint studies — look at salary ranges — updated
- 11) Extra personal day for meritorious staff
- 12) Health care benefits for part-time staff

Meetings Schedule For Fall 2004

Location: Shatzel Hall Ground Floor - GREAL Conference Room 11:45 AM - 1:00 PM

- Sept. 29
- Oct. 13
- Oct. 27
- Nov. 10
- Dec. 1
- Dec. 15

EXIT INTERVIEW? questions/results

mid year evaluation
include discussion of leave balance
& supervisor's responsibility to ensure

* handbook change
— Loh & Joe talk to Bruce about
cancellation of vacation to next year
if approved vacation request was
denied due to work at last minute

* vacation of last vacation (lump sum)

* coordinated initiation plan discussion w/ supervisor
* report to supervisor by mid year eval of
vacation account use or loss situation

\$830,000 to AS pool

111,000 taking 6/15 in same position to mid-point

Would bring a 3% to the board increase to 2.3 or 2.5%

Ohio State has a group of Administrators grades 13-21
Admin staff 7-17
separate pools

administration should never bring anyone in below 1st quartile - they would never reach mid-point

FMLA chair clarification unnecessary paperwork
PWL

Forcing people to come to work
whether they are still ill,
saying don't have to
go to doctor

Long term goals is
this yr goal

12/15

re-prioritize goals

① non-renewal of contract
protect jobs

vacation loss people sick

change det. FMLA

slipping more under the

contribution group issues

priority

morale

critical thinking/analysis

not used in budget planning process where
personnel are concerned

how many non-renewal letters important
will there be more in March
for < 3 year
resolution

ASC Personnel Welfare Committee Meeting February 1, 2005

Draft of Goals to be Submitted to President's Compensation Committee

Goals:

Increase vacation accrual maximum to 480 hours. Upon leaving the university the employee would be paid for the accrued vacation.

Provide an ongoing process and funding to ensure all administrative staff, who are in their position for five years, are receiving at least the mid-point salary in their pay rank. This salary should be achieved no later than the anniversary of their fifth year in their position.

Provide ^{additional} day of personal leave for all administrative staff who have received an annual evaluation indicating they are meeting their job expectations.

Remove the ASC Handbook reference to Compensatory Time, on page 23, and replace with a clear statement of hours to be worked by ASC staff and a process to define how compensatory time may be earned.

Increase minimum salary increase for interim and acting positions to 8%, make these permanent if position is held for one year. Increase salary increase to 8% for JAO review results which move the employee to a higher pay grade.

LONG TERM GOALS

Provide health care benefits for part time administrative staff

Communicate vacation accruals and potential loss to employees in a manner that allows the employee to avoid the loss.

Create a sick leave bank for employees to utilize when their personal sick leave is exhausted.

- Review / sw

and have 547
given satisfactory
monitoring
performance

draft a sentence for this

SEPARATE
ISSUES

State a logic for this --
because of decrease in staffing, non-
replacement of positions added to
increased responsibilities.

I would like to either have Assoc or Assoc address
a trend towards eliminating Admin. Staff in times
of budgetary crisis

E.g. Check policy
before
discharge?

minimum 10% kind memo

on additional
In addition to the current personal leave policy based upon sick leave
5

Goal [a] Provide eight hours of personal leave for all university staff who have provided satisfactory performance indicating they are meeting their job expectations.

Goal [b] Grant eight hours of personal leave to new employees, to be used during their first year of employment at BGSU

Issue:

Compensatory Time

Justification:

OFTEN

Administrative staff are expected to work the hours necessary to complete their professional duties, which ~~may sometimes require~~ ^{often} more than 40 hours per week. Administrative staff who do work more than ~~forty~~ ⁴⁰ hours per week, should be allowed to earn compensatory time, ~~that can be utilized by the implementation of flexibility in the scheduling of their work hours.~~

Goal: Remove the ASC Handbook reference to Compensatory Time, on page 23, and replace it with a clear statement of hours to be worked by ~~ASC~~ ^{Administrative} staff and a process to define how compensatory time may be earned and utilized.

Issue:

Interim/Acting Positions

Justification:

use support 1

Vacant positions are not always immediately filled. Administrative staff shoulder additional duties as more is expected of them. In the case of interim or acting appointments, the new duties are in addition to the employee's regular responsibilities. The original recommendation from a university consultant was to increase the salary by 10% in the above circumstances. The university chose to decrease that amount to the current 5% minimum increase. ~~Two goals are impacted by the consultant's report.~~

Goal:

Increase minimum salary increase for interim and acting positions to 10%; make the increase permanent if position is held for one year.

Goal:

minimum

Increase salary adjustment to 10% for JAQ review results which move the employee to a higher pay grade.

LONG TERM GOALS

Provide health care benefits for part time administrative staff

Communicate vacation accruals balance and potential loss of hours to employees in a timely manner so that the employee can avoid the loss.

Create a sick leave bank for employees to utilize when their personal sick leave is exhausted.

WHERE IS IT WRITTEN 1/4 OK sick leave payout max 240 hrs.

960⁷

ASC Personnel Welfare Committee Meeting February 1, 2005

Draft of Goals to be Submitted to President's Compensation Committee

Issue:

Accrued Vacation Time

Justification:

Full-time administrative staff can carry a maximum vacation leave balance of 392 hours. Administrative staff lose vacation hours each year. Classified staff with 20 or more years of service are allowed to accumulate 480 hours of vacation. To create an equitable system, administrative staff should also be able to accrue 480 hours.

currently may
with 20 or more yrs of service

Goal: Increase vacation accrual maximum to 480 hours. Upon leaving the university the employee would be paid for the accrued vacation. up to the maximum

Issue:

Salary Ranges

B

Justification:

I

A consultant to the University recommended that administrative staff members be paid at the mid-point of their range by the time they reach their five year anniversary of employment. The university has not met the timeline. This is due, in part, because the university has determined that the funding come out of the annual salary pool for Administrative Staff. This pool is too small to accommodate such a change. We recommend a solution similar to that used to fund faculty ERIP. The university funded the faculty ERIP from non salary pool sources and such a solution seems appropriate for the administrative staff mid-point adjustments each year.

Goal: Provide an ongoing process and annual funding, not derived from the salary pool, to ensure all administrative staff who have provided satisfactory performance for five years, are receiving at least the mid-point salary in their pay rank. This salary mid-point should be achieved no later than the anniversary of their fifth year in their position.

Issue:

Personal Leave

Justification:

[a] The additional work responsibilities absorbed and productivity achieved by administrative staff due to tightened budget constraints deserves recognition and reward. Time away from the workday will enhance morale and ultimately, productivity, since the work will still have to be completed.

[b] New staff have no leave accumulated and are often most in need of time off due to the transition process. They have a need for leave during normal business hours to assist in that transition process.

ERIP or
State of University
ERIP requested in study 5-6 yrs
on cost effectiveness
ERIP study
how much did it
cost
where did funding
come from

Modification to Health Care Plan to Be Implemented January 1, 2006

- If an employee's spouse is currently covered by the University's health care program, and
- The employee's spouse is currently employed, and
- The employee's spouse's employer offers health insurance to that spouse, and
- The employee's spouse's employer covers at least half the cost of that health insurance, then
- The employee's spouse must elect his/her employer's health insurance for themselves.

Example 1:

- In 2004, an employee of the University has elected family coverage at a cost of \$86 per month for herself, her spouse, and her two children.
- Her husband is employed and has health insurance available for himself at a cost of \$150 per month.
- Their total annual income is \$65,000.
- In 2006, all things remaining constant, the employee would be required to pay \$236 per month (\$86 for herself and her two children and \$150 for her husband) for health insurance.

Example 2:

- In 2004, a second employee of the University has elected family coverage at a cost of \$86 per month for herself, her spouse, and her two children.
- Her husband is employed but does not have health insurance available from his employer.
- Their total annual income is \$145,000.
- In 2006, all things remaining constant, the employee would be required to pay \$86 per month for health insurance.

Proposed Changes to Health Care Programs

Objective: To decrease the University's cost of providing health insurance for its employees while maintaining the values of fairness and equity.

Facts:

- The University's cost for providing health insurance for its employees is approximately \$14 million per year.
- Ninety-two percent of all employees currently eligible for health insurance benefits select the University's health insurance.
- The Board of Trustees is focused on modifying the employee contribution for health insurance to more reflect the contributions paid by employees working in business enterprises.

Proposal, Part 1:

- Increase the employee contribution for health insurance by a substantial amount.
- Provide each employee the money to offset the increase in employee contribution.

Cost Savings:

- Because of the increased employee contribution levels for the University's health insurance, other plans available to our employees from their spouse's employers will become cost competitive and our employees will select their spouse's employer's plan.
- For every employee or spouse that elects coverage in other plans, the University saves \$322.25¹ per month at a cost of the increase in the employee contribution.
- For every family that changes plans, the University saves \$697.25¹ per month at a cost of the increase in the employee contribution.

Example:

- The University increases the employee contribution for health insurance by \$100.
- The University gives each employee \$100.
- As a result, the employee's spouse's employer's health insurance for family coverage is a better bargain than the University's.
- The employee's spouse elects family coverage from his/her employer.
- By spending \$100 the University saves \$697.25.

Proposal, Part 2:

- Add a contribution level for employee plus children.
- Establish the contribution level of employee plus children that enduces spouses to select their employer's health insurance.

Cost Savings:

- For every spouse that elects coverage in his/her employer's plan, the University saves \$322.25¹ per month at a cost of the difference in contribution levels.

Example:

- The University creates a contribution level of employee plus children with and employee contribution of \$45 and maintains the \$86 employee contribution for family coverage.
- The employee's spouse elects single coverage in his/her employer's health insurance plan at a cost of \$20.
- The employee saves \$21.
- The University saves 322.25¹ at a cost of \$41.

¹ Based on premium equivalents for 2004.

Resolution

Whereas, the University's cost of providing health insurance benefits to its employees is significant and increasing at a substantial rate, and

Whereas, we recognize that the University must take measures to control the cost of providing health insurance to its employees, and

Whereas, the University Administration is currently planning to reduce their cost of health insurance by implementing a modification to the health insurance program that would require most spouses of employees who have health insurance available from their employers to avail themselves of that insurance, and

Whereas, we view such a plan to be inherently unfair and discriminatory to a select group of employees and not in the best interest of the University as a whole,

Be it resolved, that we, the Administrative Staff Council, respectfully request that the University Administration delay the implementation of these modifications to the University's health insurance program for at least one year to allow time for a comprehensive review of the University's health care plan by qualified health care consultants.

X-Sender: abowers@mailstore.bgsu.edu
X-Mailer: QUALCOMM Windows Eudora Version 6.0.0.22
Date: Wed, 08 Sep 2004 09:23:36 -0400
To: annje@bgnet.bgsu.edu
From: Ann Bowers <abowers@bgnet.bgsu.edu>
Subject: for what it is worth

My memory continues to work on this merit/evaluation issue. Back under Olscamp (yes, the good days), there were about 2-3 years when based on requests by administrative staff council, HR finally took responsibility for notifying the VPs about which administrative staff in their respective area had not been evaluated in writing as HR had not received anything. Then it fizzled out because no one kept pushing HR. I can remember this because Betsy Clark notified Rush Miller who notified Paul that they needed to be done one time when he was late with them. So the system can work if HR takes responsibility for enforcing the handbook. This would have been in the mid to late 1980s.

Ann Bowers
Interim Director
Center for Archival Collections
Bowling Green State University
Bowling Green, OH 43403
(419) 372-2411
(419) 372-0155 FAX
abowers@bgnet.bgsu.edu

ASC Personnel Welfare Committee Meeting February 1, 2005

Draft of Goals to be Submitted to President's Compensation Committee

Issue:

Accrued Vacation Time

Justification:

University administrative staff are losing vacation at the rate of thousands of hours each year. Classified staff with 20 or more years of service are allowed to accumulate 480 hours of vacation. ~~In fairness to To create an equitable system, administrative staff they~~ should also be able to accrue 480 hours.

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Goal: Increase vacation accrual maximum to 480 hours. Upon leaving the university the employee would be paid for the accrued vacation.

Issue:

Salary Ranges

Justification:

~~The university consultant has recommended this mid-point achievement and A consultant to the University recommended that administrative staff members be paid at the mid-point of their range by the time they reach their five year anniversary of employment. The university has not met the timeline. This is due, in part, because the university has been insisting determined that the funding come out of the annual salary pool for Administrative Staff, and this is not realistic because the This pool is so too small to accommodate such a change. We recommend a solution similar to that used to fund faculty ERIP. The university funded the faculty ERIP from non salary pool sources and should do so such a solution seems appropriate for the administrative staff mid-point adjustments each year.~~

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Goal: Provide an ongoing process and annual funding, not derived from the salary pool, to ensure all administrative staff who ~~are in their position for five years, during which the employee has have~~ provided satisfactory performance for five years, are receiving at least the mid-point salary in their pay rank. This salary mid-point should be achieved no later than the anniversary of their fifth year in their position.

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Issue:

Personal Leave

Justification:

[a]The additional work responsibilities absorbed and productivity achieved by administrative staff ~~due to tightened budget constraints deserves recognition and reward, for the additional~~ Time away from the workday will enhance morale and ultimately, productivity, ~~even though since the work will still have to be completed.~~

Deleted: deserves

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Deleted: productivity

Deleted: work day

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[b] New staff have no leave accumulated and are often most in need of time off due to ~~much involved in the transition process of a new employee at BGSU.~~ They have a need for leave during normal business hours to assist in that transition process.

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Goal [a] Provide a minimum of eight hours of personal leave for all university staff who have provided satisfactory performance indicating they are meeting their job expectations.

Goal [b] Grant eight hours of personal leave to new employees, to be used during their first year of employment at BGSU

Issue:

Compensatory Time

Justification:

Administrative staff, are expected to work the hours necessary to complete their professional duties, which may sometimes require more than 40 hours per week.

Administrative staff, who do work more than forty hours per week, should be allowed to earn compensatory time, that can be utilized by the implementation of flexibility in the scheduling of their work hours.

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Goal: Remove the ASC Handbook reference to Compensatory Time, on page 23, and replace it with a clear statement of hours to be worked by ASC staff and a process to define how compensatory time may be earned and utilized.

Deleted: the ASC

Issue:

Interim/Acting Positions

Justification:

During tight budget times, vacant positions are not always immediately filled. As a result, current employees often take on added responsibilities. When these additional duties include temporary or interim duties, they are added in addition to the previous duties the employee was performing. The original recommendation from a University consultant was to increase the salary by 10% in the above circumstances. The university chose to decrease that amount to the current 5% minimum increase. Two goals are impacted by the consultant's report.

Deleted: Administrative are adding additional duties to their responsibilities as we continue to expect more from each position

Deleted: the

Deleted: use

Deleted: It is time to implement the 10% to properly reflect the employees' contributions.

Goal:

Increase minimum salary increase for interim and acting positions to 10% , make the increase permanent if position is held for one year.

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Deleted: Increase salary increase to 10% for JAQ review results which move the employee to a higher pay grade.

Goal:

Increase salary adjustment to 10% for JAQ review results which move the employee to a higher pay grade.

LONG TERM GOALS

Provide health care benefits for part time administrative staff

Communicate vacation accruals balance and potential loss of hours to employees in a timely manner so that the employee can avoid the loss.

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Deleted: to

Create a sick leave bank for employees to utilize when their personal sick leave is exhausted.

* Time From MEMO

Appendix G
Budget issue
minutes MBZ

10% Known ↓ 5%

Photos Brad/Cay

Exec. Committee
minutes

Non Compensation
PAUL LOPEZ
BOT memo

Suggestion by
sub to consultant
(not minutes) to minimum
10%
provided equity
maxim. compensation
He was spending
minutes to 50%

- Compensation

~~41-B-1~~
~~42-C-5~~
~~44-A-6~~
~~44-C-1~~
~~44-C-4~~
~~47-C-3~~
~~42-C-4~~

~~43-C-4~~
~~43-C-1~~
~~44-B-3~~
~~44-C-2~~
~~45-C-3~~
~~46-C-4~~
~~43-C-6~~

44-5-B
~~42-C-2~~

2.5	67
.75	10.5
125	\$ 10.5
175	2.87
1.875	13.37

HR Meeting May 21

- Jan 2006 if possible rule - if they can get someone elected they must
- Turnover Study
- Hiring freeze like July 1

2004

status quo

higher wage for 7.1 those at bottom 2.1 for those high up
 raised 90 for those above midpoint to help those below up

X-Sender: mzachar@mailstore.bgsu.edu
X-Mailer: QUALCOMM Windows Eudora Version 6.0.0.22
Date: Tue, 01 Jun 2004 16:50:49 -0400
To: "Ann B. Jenks" <annje@bgsu.edu>
From: Mary Beth Zachary <mzachar@bgsu.edu>
Subject: Re: 10% solution

Hi,

I vaguely remember this as an issue that HR simply didn't take (probably because the administrative group led by Dr. Dalton, etc. didn't want to commit resources. I don't think it was another group beside Mercer, however, if it was, it was probably a Hayes recommendation from another university. I have no memory of it being another group, though.

mbz

At 01:33 PM 6/1/2004, you wrote:

Mary Beth,
Laura Emch asked if I could find the documentation of the following scenario from the past: The suggestion was made by an outside consulting firm (other than mercer) that there needed to be a 10% market adjustment for administrative staff promotions and interim positions. HR opposed this and the amount was reduced to 5%.

I thought I'd ask if you remember a time frame on this before I go looking. I found a memo from you to ASC Constituents dated 9/5/96 regarding the draft Mercer Plan. Here's a quote from your memo: "there are serious concerns still outstanding. The proposal is often vague in the extreme. The scribbles are mine. For instance in #5, 5% is scratched out and 10% written in. The university's proposal is for 5%. ASC discussed the 10%...and will forward that recommendation again."

I showed this to Laura to see if this was what she wanted and she said ask Mary Beth if she remembers. This is an issue she thinks PWC needs to revisit this year.

Thanks,
Annie

Ann B. Jenks
Interim University Archivist and Assistant Director
Center for Archival Collections
5th Floor Jerome Library
Bowling Green State University
Bowling Green OH 43403
(419) 372-2411

APPENDIX G**G. ADMINISTRATIVE STAFF COMPENSATION PLAN****INTRODUCTION AND RATIONALE**

In order for Bowling Green State University (BGSU) to attract and retain qualified administrative staff employees, it is BGSU's policy to maintain fair and competitive grade levels and pay ranges without regard to race, sex, sexual orientation, color, national origin, ancestry, religion, age, marital status, disability, or status as a Special Disabled or Vietnam-era veteran.

The purpose of the Administrative Staff Compensation Plan is to establish a system that reflects

- Relationships between positions and their worth
- The principles of equitable compensation
- Competition with the external employment market

SCOPE

These policies and procedures apply to all occupied administrative staff positions and supersede all previous written or unwritten practices. The ongoing responsibility for the administration of the Administrative Staff Compensation Plan (Plan) is assigned to the Assistant Vice President for Human Resources.

I. Objectives

It is the intent of the Administrative Staff Compensation Plan to

- Administer the Plan in accordance with the general policies of the University
- Provide a compensation plan that is internally equitable (as determined by comparing similar University positions) and externally competitive with the market. When appropriate, this plan will be determined by comparing salary ranges within the University with salary ranges for similar positions outside the University.
- Ensure equitable compensation for positions requiring similar educational levels, experience levels, skills, effort, working conditions, and levels of responsibilities

Administrative Staff Handbook

- Ensure that the administration of the position evaluations and grade level assignments is consistent and uniform throughout the University
- Provide for a review process that will address inequities
- Allow for the maintenance of competitive grade levels
- Provide policies and procedures which ensure that the Plan will be equitably and efficiently administered

II. Definition of Terms

The following terms are used in the Administrative Staff Compensation Plan:

A. Administrative Staff Advisory Team Members

The Administrative Staff (AS) Advisory Team consists of 16 (sixteen) administrative staff members selected by the Administrative Staff Council (ASC) Executive Committee. Team members serve three-year terms (September 1 / August 31) with five or six new members joining the team each year. Team members must be inactive for one year after completion of their three-year term before they can be considered for re-appointment. If a committee member cannot complete his/her term, ASC's Executive Committee will appoint a member from the same functional area to complete the term. Membership to this committee should include representatives from all functional areas.

The team's primary responsibility is to collaborate with Human Resources in the re-evaluation of JOB Analysis Questionnaires. Human Resources and past members of the Administrative Staff Advisory Team train team members to analyze, evaluate, and recommend a grade level (numeric ranking) for currently occupied administrative staff positions.

Each time an administrative staff position is re-evaluated, Human Resources selects four members from the Team to participate in the process, attempting to rotate participation equally among members. One team member must be from the same vice-presidential area as the position being re-evaluated. The other three team members should be from different vice-presidential areas. If one member of the four-person team feels it is necessary to recuse him/herself the

process can continue with a three-member team. If more than one team member wishes to be recused, a new team may be assigned. The Human Resource director appoints two members of the Human Resource staff to serve as committee members.

Administrative staff team members also participate in the Conciliation/Appeals process, but individual team members may not participate in both the re-evaluation and the appeals process for the same position.

Administrative Staff Advisory Team Member Rotation:

The Administrative Staff advisory team consists of 16 (sixteen) Administrative Staff members selected by the ASC Executive Committee for staggered three-year terms.

- A. Members will begin service on September 1 and serve for three years, ending on August 31.
 - B. Each year, five or six new members will be appointed to replace the five or six who are completing their service.
 - C. Membership to this committee should represent all of the functional areas. If the university structure changes, the next members appointed should address any committee inequities resulting from the new structure.
 - D. If a committee member cannot complete his/her term, ASC'S Executive Committee will appoint a member from the same functional area to complete the term.
 - E. No members shall serve consecutive three-year terms.
- B. Grade Level
- The grade level is the numeric ranking of administrative staff positions from 5 to 23.
- C. Human Resources/Administrative Staff Advisory Team (HR/AS Advisory Team)
- Two members of the Human Resources staff and the four members selected from the Administrative Staff Advisory Team comprise the HR/AS Advisory Team. This combined team is responsible for analyzing, evaluating, and recommending a grade level whenever an occupied administrative staff position is re-evaluated.
- D. JOB Analysis Questionnaire

Administrative Staff Handbook

The Job Analysis Questionnaire is the instrument used to describe the position responsibilities. This questionnaire is used by the HR/AS Advisory Team and/or Human Resources to determine the grade level of an administrative staff position based upon the level of knowledge and experience, creativity and complexity, impact on the institutional mission, internal and external contacts, and leadership. The JOE Analysis Questionnaire must be completed in order for any administrative staff position to be created and/or changed.

E. Pay Range

The pay range is the compensation for a particular grade level. Each pay range has a designated minimum, midpoint, and maximum. In 2001/2002 for example, in grade level 14 the minimum is \$33,404, the midpoint is \$42,590, and the maximum is \$51,776.

F. PRESIDENT'S Compensation Working Group

The President's Compensation Working Group is comprised of administrators appointed by the President. This group routinely reviews issues regarding the Plan and decides the outcome of the appeals process.

III. Policies

The following policies have been established for the maintenance and management of the Administrative Staff Compensation Plan.

A. New Administrative Staff Hire

New administrative staff generally is hired between the minimum and midpoint of a grade level. A salary assigned above the midpoint requires prior approval by the Vice-President, after consultation with the Offices of Human Resources and Equity, Diversity And Immigration Services (EDIS). (Number 2 - Approved by Board of Trustees, September 13, 1996.)

B. Upgrade

Definition:

A position is re-evaluated and assigned to a higher-grade level as a result of significant expansion in the position's existing duties and responsibilities.

Policy:

The incumbent is guaranteed at least a 5% increase in salary or the minimum salary for the new level, whichever is greater. (Number 3 - Approved by Board of Trustees, September 13, 1996).

C. Promotion

Definition:

An incumbent moves from a position requiring a certain level of skill, effort, and responsibility to a position requiring a significantly greater degree of skill, effort, and responsibility.

Policy:

When an employee is promoted, she/he is guaranteed at least a 5% increase in salary or the minimum salary for the new level, whichever is greater. (Point 4 - Approved by Board of Trustees, September 13, 1996.)

D. Interim/ Acting Positions

Definition:

A staff member is assigned to a position on an interim/ temporary/ acting basis.

Policy:

If the assignment is longer than 30 calendar days and is in a higher grade level, the staff member receives a premium for the time served equal to at least a 5% increase in salary or the minimum for the interim grade level, whichever is greater. (Point 5 - Approved by Board of Trustees, September 13, 1996.)

E. Demotion

Definition:

An incumbent staff member moves from a position requiring a certain level of skill, effort, and responsibility to another position in a lower grade level requiring a lesser degree of skill, effort, and responsibility.

Policy:

When a demotion occurs, the incumbent's salary is reduced to a level in the lower pay range equivalent to his/her level in the original pay range. (Point 6 - Approved by Board of Trustees, September 13, 1996) The President, in consultation with the Vice-President and Human Resources, must approve any exceptions to this policy.

F. Downgrade

Definition:

A position is reassigned to a lower grade level as a result of significant reduction in the position's existing duties and responsibilities.

Administrative Staff Handbook

Policy:

When a position downgrade occurs, the incumbent's salary is reduced to the level in the lower pay range equivalent to his/her level in the original pay range. The President, in consultation with the Vice-President and Human Resources, must approve any exceptions to this policy.

G. Transfer

Definition:

An incumbent staff member moves from a position requiring a certain level of skill, effort and responsibility to another position requiring the same degree of skill, effort, and responsibility that is assigned to the same grade level.

Policy:

When a transfer occurs, normally the incumbent's salary will not be adjusted. (Point 7 - Approved by Board of Trustees, September 13, 1996.) The President, in consultation with the Vice-President and Human Resources, must approve any exceptions to this policy.

H. Market Exceptions

Definition:

A market exception is a special salary premium established for particular positions when unusual market conditions exist, causing excessive turnover, salary midpoints well below market average, and/or failure of current salary to attract qualified candidates.

Policy:

A special market salary premium may be paid for these positions. (Point 8 - Approved by Board of Trustees, September 13, 1996.)

I. Pay Above Maximum

Policy:

Administrative staff salaries are capped at the maximum or above the maximum of a pay range. However, staff members whose salaries are currently at or above the maximum are exempt for a period of three years. Effective July 2000, the salaries of any staff still above maximum MAY be frozen until such time as those salaries are within his/her range. If, at any time during the three years, a staff member's salary should fall within range, the exemption ceases to apply to that staff member and the capped maximum will be enforced. (Point 10 - Approved by Board of Trustees, September 13, 1996.)

Staff at the maximum will be considered for a merit increase not to exceed the percentage adjustment of the pay range.

Staff above the maximum is eligible each year for a one-time, merit-based bonus not to exceed the percentage of the salary pool designated for merit each year. This will occur only when the Board of Trustees authorizes bonuses and will not be added to base salaries.

J. Progression Through the Pay Range

Definition:

Progression through a pay range is the method by which an incumbent moves through his/her assigned pay range.

Policy:

Staff progress through pay ranges based on meritorious performance. Human Resources, in conjunction with the Administrative Staff Council Executive Committee, will develop by the year 2002 criteria and a process for staff to reach the midpoint of a pay range.

K. Title Revision

Policy:

Title changes may be requested to more accurately reflect position responsibilities. A Job Analysis Questionnaire is completed and forwarded to Human Resources in accordance with established procedures. If the proposed title accurately reflects the responsibilities, the HR/AS Advisory Team may recommend that the title be changed regardless of any change in the grade level. No title change occurs without approval from the supervisor, Vice-President, and Human Resources.

L. Salary Range Adjustments

Policy:

Effective 1997-98, the ranges for each grade level will be adjusted in a three-year recurring cycle. In the first two years of the cycle, the pay range of each grade level will move up annually by an amount that is 1% less than the average salary increase paid to staff that year. (Number 9 - Approved by Board of Trustees, September 13, 1996.)

Every third year beginning with 1999-2000, the University will re-evaluate the ranges in light of current market conditions, as well as other relevant factors, and adjust the ranges in accordance with that

re-evaluation. (Point 9 - Approved by Board of Trustees, September 13, 1996.)

IV. Administrative Compensation Plan Position Evaluation/Re-evaluation Processes

The position evaluation process is the method by which positions are evaluated against a uniform set of criteria and assigned to established grade levels and appropriate pay ranges. Human Resources conducts the evaluations for new positions. Human Resources and the Administrative Staff Advisory Team jointly conduct the re-evaluation of occupied positions. re-evaluation occurs when initiated by the incumbent, the supervisor(s), or Human Resources. It is anticipated that re-evaluation initiated by the incumbent or the supervisor(s) for a specific position will occur no more than once every two years. Position evaluations/re-evaluations are normally completed in twelve (12) weeks from the time the JAQ is submitted to Human Resources unless there is an agreement to extend the timelines and all parties are informed.

A. Positions are evaluated when one of the following occurs:

- A new position is created. A supervisor, area head, dean, Vice-President, or President/Designee, in consultation with Human Resources, is responsible for submitting a completed JOB Analysis Questionnaire to Human Resources.
- A position becomes vacant. A supervisor, area head, dean, Vice-President, or President/Designee in consultation with Human Resources is responsible for submitting a completed Position Analysis Questionnaire to Human Resources.

B. Positions are re-evaluated when one of the following occurs:

- A significant change in responsibilities occurs or is proposed in existing positions. Re-evaluations are initiated by the incumbent or the supervisor submitting a completed Job Analysis Questionnaire to Human Resources.
- Reorganization occurs. Re-evaluations are initiated by an area head, dean, Vice-President, or President/designee prior to the reorganization and in consultation with Human Resources. Reorganization may result in significant changes in position responsibilities.

C. Re-evaluation Process for Administrative Staff Positions Initiated By The Incumbent And/Or Supervisor:

1. The initiator completes the Job Analysis Questionnaire that is found on Human Resources web site:
<http://www.bgsu.edu/offices/ohr/forms>.
The criteria used in the grading process are also on this web site. If the initiator is the employee, the completed Questionnaire is forwarded to both the immediate supervisor and the second-level supervisor for signature and comment. When an initiator is a supervisor, area head, or Vice-President, the supervisor meets with the incumbent to discuss position responsibilities and obtain signatures on the Questionnaire. The supervisor comments, signs, and forwards the Questionnaire to the second-level supervisor. Supervisor and employee retain a copy.
2. Upon receipt of the Questionnaire, the second-level supervisor evaluates, comments, signs, and forwards the JAQ to Human Resources.
3. Upon receipt of the completed JOB Analysis Questionnaire, Human Resources logs in the JAQ, notifies the initiator, and begins a tracking/timeline. Human Resources reviews all documents for completeness, gathers additional information as needed, and distributes the documents to the HR/AS Advisory Team. Any changes, additions, or deletions made to the JAQ by Human Resources must be forwarded to the employee and supervisor.
4. The HR/AS Advisory Team analyzes, evaluates, and recommends a grade level based on the established criteria. In the event the HR/AS Advisory Team requests additional information, Human Resources gathers the additional information and forwards it to the Team.
5. Human Resources forwards the results of the re-evaluation to the immediate supervisor and the appropriate Vice-President for consideration. If the position reports directly to the President, it is forwarded to the President/Designee for consideration.
6. After input from the immediate supervisor and/or the secondary supervisor, the Vice-President or President/Designee reviews all

Administrative Staff Handbook

documents and forwards a written decision about the position to Human Resources.

7. Immediately following the Vice-Presidential or Presidential/designee decision, Human Resources forwards copies of the re-evaluation results, including documentation that supports the committee's recommendation to the employee and the appropriate supervisory structure.
8. Administrative staff and/or initiators who do not agree with the determination may meet with Human Resources and, if appropriate, the immediate supervisor for further explanation. If there is still no agreement, the staff member and/or initiator may follow the Conciliation/Appeals process.

V. Conciliation/Appeals Process

The purpose of the Conciliation/Appeals Process is to ensure prompt resolution of disagreements regarding the results of position re-evaluations and subsequent placement in the Plan.

There are three steps in the process:

1. Conciliation Meeting
2. Appeals Board
3. Presidential Appeal

A. Conciliation Meeting

The Conciliation Meeting, facilitated by the Assistant Vice President for Human Resources/designee, provides the initiator of the conciliation process and the Vice-President with an opportunity to resolve the complaint in a collaborative, informal fashion. If the position reports directly to the President, the President/designee will participate in the conciliation process. Participants in the meeting include:

- Employee
- Immediate Supervisor
- Vice-President or President/designee
- Assistant Vice President for Human Resources/designee
- ASC Review Team member from the initial re-evaluation team

The process is normally completed within four (4) weeks unless there is an agreement to extend the timelines and all parties are informed.

Process:

1. Within seven (7) calendar days after receiving the Vice-Presidential or Presidential/designee decision and relevant documentation from Human Resources, the initiator/incumbent informs Human Resources in writing of the intent to enter into conciliation.
2. Upon receipt of the request for conciliation, Human Resources begins a tracking timeline.
3. Human Resources coordinates a meeting with the appropriate parties. A meeting must be convened within thirty (30) calendar days of the request for conciliation.
4. Human Resources is responsible for reporting, in writing, the outcome of the meeting to all involved parties within fourteen (14) calendar days of the meeting.
5. If the meeting results in a change of grade level for the position in question, Human Resources, in conjunction with the initiator/incumbent, recommends the effective date of the change to the Vice-President. No action is necessary if the meeting results in no change in the position.
6. If the initiator/incumbent is not satisfied with the decision, she or he can request an Appeals Board review.

B. Appeals Board

The Appeals Board provides the initiator of the appeals process an opportunity to achieve resolution through the involvement of administrative staff in reviewing the appeal and making recommendations to the President's Compensation Working Group. The Appeals Board consists of five (5) members of the Administrative Staff Advisory Team who have not been involved in the re-evaluation or conciliation process. Human Resources is available as a resource. The process is normally completed within sixteen (16) weeks unless there is an agreement to extend the timeline and all parties are informed.

Administrative Staff Handbook

Process:

1. Within seven (7) calendar days of conciliation, the initiator informs Human Resources and the Vice-President, in writing, of the intent to appeal. If the position reports directly to the President, the initiator informs Human Resources and the President/Designee, in writing, of intent to appeal.
2. Within seven (7) calendar days of notification of the intent to appeal, Human Resources forwards the appeals packet (an appeal request form, JAQ, factor sheet, and supporting documentation) to the initiator.
3. Within fourteen (14) calendar days of receiving the appeals packet, the initiator completes the appeal request form and forwards any supporting documentation to Human Resources.
4. Upon receipt of the completed documentation, Human Resources forwards a copy of the initiator's completed appeals packet and any other documentation to the Vice-President or President/Designee. Within fourteen (14) calendar days of receiving the information from Human Resources, the Vice-President or President/Designee acknowledges receipt of the packet and forward any comments, in writing, to Human Resources. Human Resources forwards a copy of the response to the initiator.
5. During steps three and four, Human Resources, in conjunction with the initiator, selects five (5) Administrative Staff Advisory Team members for the Appeals Board. Advisory Team members who participated in the re-evaluation or conciliation process are not eligible to serve on the Appeals Board.
6. Within seven (7) calendar days of receiving the completed documentation from the Vice-President or President/Designee, Human Resources forwards this documentation and the initiator's documentation to the Appeals Board.
7. Within fourteen (14) calendar days of receipt of the completed documentation, the Appeals Board meets to review the original re-evaluation decision and subsequent documentation triggered by the appeals process.
8. Within seven (7) calendar days of the review, the Appeals Board submits its recommendation and supporting rationale in writing to Human Resources, initiator, Vice-President or President/Designee and President's Compensation Working Group.
9. Within thirty (30) calendar days of receiving the recommendation of the Appeals Board, the President's Compensation Working

Group, without the Vice-President or President/Designee where the appeal occurs, reviews the recommendation of the Appeals Board and makes a decision.

10. Within seven (7) calendar days of making a decision, the President's Compensation Working Group will submit the decision and supporting rationale in writing to the initiator, supervisor, Vice-President or President/Designee, and Human Resources.
11. If the decision results in a change of grade level, Human Resources recommends the effective date of the change with the Vice-President or President/Designee.
12. If the initiator or Vice-President or President/Designee is not satisfied with the decision, she/he can appeal to the President.

C. Presidential Appeal

1. Within seven (7) calendar days of receiving the decision of the President's Compensation Working Group, the initiator or Vice-President appeals in writing to the President or his/her designee. The designee cannot be from the initiator's Vice Presidential area, Human Resources, or President's Compensation Working Group. If the position reports directly to the President, the President appoints a designee for this process.
2. Within thirty (30) calendar days after receiving the appeal, the President or designee makes a decision and notifies in writing the initiator, supervisor, Vice-President, President's Compensation Working Group, and Human Resources.
3. The decision of the President or designee is final.

Last Revision Date: July 3, 2001

Administrative Staff Council Approval: October 4, 2001

ASC Personnel Welfare and Salary Committee Annual Report

April 30, 2005

Co-Chairs: Steve Kendall and Dave Crooks

The committee met on more than eight occasions to discuss the goals and progress toward achieving those goals.

The co-chairs received the total Administrative Staff salary spreadsheet from Human Resources and proceeded to analyze the pay range penetration of all Administrative Staff by pay grade and years in position.

The results of the pay range penetration study show many Administrative Staff are well below the 50% penetration point in their respective pay ranges and have been in their position longer than necessary to reach the 50% penetration point. Clearly this is an issue that needs to be remedied by the University in a manner agreeable to ASC and their constituents. When this issue was presented to the President's Compensation Working Group, we indicated any monies needed to address this issue should not have to come from the annual salary pool.

The following represent the goals presented to the President's Compensation group.

Goals Submitted to President's Compensation Committee

Issue:

Accrued Vacation Time

Justification:

Full-time administrative staff currently may carry a maximum vacation leave balance of 352 hours. Administrative staff lose vacation hours each year. Classified staff with 20 or more years of service are allowed to accumulate 480 hours of vacation. To create an equitable system, administrative staff with 20 or more years of service should also be able to accrue 480 hours.

Goal: Increase vacation accrual maximum to 480 hours. Upon leaving the university the employee would be paid for the accrued vacation up to that maximum.

Issue:

Salary Ranges

Justification:

A consultant to the University recommended that administrative staff members be paid at the mid-point of their range by the time they reach their five year anniversary of employment. The university has not met the timeline. This is due, in part, because the university has determined that the funding come out of the annual salary pool for Administrative Staff. This pool is too small to accommodate such a change. We recommend a funding solution that uses the Market Adjustments and Promotions pool.

Goal: Provide an ongoing process and annual funding, not derived from the salary pool, to ensure all administrative staff who have provided satisfactory performance for five

years, are receiving at least the mid-point salary in their pay rank. This salary mid-point should be achieved no later than the anniversary of their fifth year in their position.

Issue:

Personal Leave

Justification:

[a] The additional work responsibilities absorbed and productivity achieved by administrative staff due to tightened budget constraints deserves recognition and reward. Time away from the workday will enhance morale and ultimately, productivity, since the work will still have to be completed.

[b] New staff have no leave accumulated and are often most in need of time off due to the transition process. They have a need for leave during normal business hours to assist in that transition process.

Goal [a] Annually provide eight hours of personal leave for all university staff who have provided satisfactory performance indicating they are meeting their job expectations.

Although it is university policy that every employee receive an annual evaluation, in the absence of an evaluation it is presumed the employee has performed, at minimum, satisfactorily.

Goal [b] In addition to the current personal leave policy based on sick leave accruals; provide an additional eight hours of personal leave to new employees to be used during their first year of employment at BGSU.

Issue:

Compensatory Time

Justification:

Administrative staff are expected to work the hours necessary to complete their professional duties, which often requires more than 40 hours per week. Administrative staff who work more than 40 hours per week, should be allowed to earn compensatory time, to be utilized in accordance with the same policies for the use of "Comp" time by Classified Staff.

Goal: Remove the Administrative Staff Handbook reference to Compensatory Time, on page 23, and replace it with a clear statement of hours to be worked by administrative staff and a process to define how compensatory time may be earned and utilized.

Issue:

Interim/Acting Positions

Justification:

Vacant positions are not always immediately filled, or not filled at all. Administrative staff perform additional duties as more is expected of them. In the case of interim or acting appointments, the new duties are in addition to the employee's regular responsibilities. The original recommendation from a university consultant was to increase the salary by 10% in the above circumstances. The university chose to decrease that amount to the current 5% minimum increase. We support the original recommendation of the consultant.

Goal:

Increase minimum salary increase for interim and acting positions to 10%; make the increase permanent if position is held for one year.

Goal:

Increase salary adjustment to a minimum increase of 10%, or the minimum salary in the new range, whichever is higher, for JAQ review results which move the employee to a higher pay grade.

Issue:

Annual Wage Pool

Justification:

The increased productivity and priority achievements expected from administrative staff justify an annual salary increase.

Goal:

An administrative staff wage pool be created to provide a 4% salary increase for those staff who meet or exceed expectations. An additional 1% super merit pool be created for those administrative staff who greatly exceed expectations.

LONG TERM GOALS

Provide health care benefits for part time administrative staff

Communicate vacation accruals balance and potential loss of hours to employees in a timely manner so that the employee can avoid the loss.

Create a sick leave bank for employees to utilize when their personal sick leave is exhausted.

In addition to the above goals submitted to the President's Compensation Group, the BGSU Administrative Staff salary data was analyzed to determine if any gender/years of service bias existed in each of the salary grades. No significant gender/years of service bias was found.

A wellness goal was achieved with the implementation of a Recreation Center membership subsidy for university staff who participated in certain wellness programs.

This report is respectfully submitted by the co-chairs of the PWC.

The Professional Welfare Committee focused salary compensation and benefit areas such as vacation accrual and loss, personal time accrual, and flexible scheduling.

The main focus was research into our existing Mercer-based compensation plan.

The PWC and some executive Council members met with representatives from Mercer and held a productive discussion regarding the level of success BGSU has had in implementing this plan.

Discussion points also included options to improve the function of the existing plan.

An overview of the Mercer plan was made to ASC in the March meeting

From these discussions, PWC developed a compensation plan for Administrative Staff to be presented to the VP Compensation Committee on 4/12/06

That presentation is attached to this document.

The results of that meeting are as follows:

1. Salary Increase - 4%, expected to be split as 3% across the board and 1% merit
2. Full Implementation of Merit System - notice of evaluations due will be e-mailed
3. Movement thru Mercer Ranges - not addressable
4. Accrued vacation - revisit in October
5. Personal Leave - research costs of those with 1-3 years in service
6. Scheduling Flexibility - Define new language for handbook
7. Interim and Acting Positions - Research other institutions
8. Long Term Goals -
 - a) health care benefits for part-time - research costs
 - b) communicate vacation accruals - work with HR to inform supervisors and staff
 - c) create a sick leave bank - in progress
 - d) explore wellness programs - collaboration between HR and ASC

Respectfully,

Dave Crooks
Steve Kendall
(Co-Chairs)

*DeVine volz ok ombuds persons
comparison w/ other institutions
Salary benefits health care wellness program non monetary
What are peer institutions they compare faculty salaries with*

X-Mailer: QUALCOMM Windows Eudora Version 7.0.1.0

Date: Tue, 26 Sep 2006 11:22:32 -0400

To: dcrooks@bgnet.bgsu.edu, skendal@bgnet.bgsu.edu, annje@bgnet.bgsu.edu,
bnagel@bgnet.bgsu.edu, lemch@bgnet.bgsu.edu, mzachar@bgnet.bgsu.edu,
marka@bgnet.bgsu.edu

From: Dave Crooks <dcrooks@bgnet.bgsu.edu>

Subject: Meeting on 9/28/06 Fifth Floor Library

Cc: Iona Leck <iona@bgnet.bgsu.edu>

Hi Everyone:

Please review the annual report for PWC from last Spring. This will be the basis for this year's goals. In addition we should work on the flex time statement, reward policy and possible employee discounts from Dining Services and other areas where employees do business with other auxiliaries. Please bring or send ideas for other new goals or new approaches to continued goals.

Thanks

Dave

Dave Crooks

Asst. to VPSA

305B Saddlemire Student Services Building

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dcrooks@bgnet.bgsu.edu



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